Cover Sheet

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Document Title: **INSTRUCTOR'S FINAL REPORT ON TRAINING COURSE ABOUT STRATEGIC PLANNING FOR PROTECTED AREA SYSTEMS**

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USAID Regional Environmental Program

Strategic Objective # 2: Increased effectiveness in regional stewardship of the environment and key natural resources in targeted areas.

Intermediate Result 1: Improved consolidation of the Central American Protected Area System

Intermediate Result 3: Central America environmental policy framework harmonized and strengthened.

INSTRUCTOR'S FINAL REPORT ON TRAINING COURSE ABOUT STRATEGIC PLANNING FOR PROTECTED AREA SYSTEMS

22-26 June 1998
Costa Rica

Programa PROARCA/CAPAS

Instructor: James Jackson Griffith
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1. INTRODUCTION

With the objective of improving the strategic planning effectiveness of their National System of Conservation Areas of Costa Rica (SINAC), 19 technical members attended the five day course provided by the PROARCA/CAPAS Program. The training took place at the Horizontes Experiment Station in the Guanacastes Conservation Area, Costa Rica. The SINAC coordinators were Sr. Gerardo Artavia Zamora and Yadira Mena Araya.

Specific instructional objectives were:

- Interpret the role of strategic planning within the context of Environmental Management Systems (EMS).
- Develop long range vision for protected area programs.
- Apply the systemic thinking model to diagnose diverse situations of protected areas and to do strategic program planning.
- Optimize teamwork within and among groups using an institutional development model which promotes participatory processes to create learning organizations.
- Direct and prioritize actions to promote better results by means of establishing institutional mission and objectives.
- Optimize use of existing resources.

The text, ***Planificación Estratégica Para Áreas Silvestres Protegidas*** (1998, 65 p.), written by the course instructor, consisted of six chapters:

1. Introduction.
2. The Creation of Shared Institutional Vision.
3. Systemic Thinking.
4. Teamwork and Synergy Among Groups.
5. Diagnosis and Evaluation of Protected Area Problems (Case Studies).

6. Implementation Techniques.

For methodology, the course used ***synergogy***, a form of collaborative or cooperative learning defined as a systematic approach to learning in which the members of small teams learn from one another through interactions structured by a specialist.

2. DESCRIPTION OF ACTIVITIES

Given the participatory nature of the training, the 19 participants worked very hard all week, organized into four teams. After a test of previous knowledge and the course introduction, as a first exercise each team ranked seven cartoons which depict group dynamics situations, from best to worst. Results were presented in plenary sessions. That first exercise set an ideal standard for the rest of the week's teamwork. Then they established other ideals for parks and reserve systems including a land use vision.

Next, participants were introduced to systemic thinking. Each team was required to model a specific problem of its choosing and relevant to its situation within SINAC by using a systemic thinking strategy. The subjects chosen were: a) **lack of management plans for some parks**, b) **illegal vegetation extraction (orchids, etc.) from protected reserves**, c) **poor use of radio communications**, **and** d) **manipulation of environmental laws**.

At appropriate moments, the instructor, using transparencies, gave lecture presentations on strategic planning topics. In two other instances, ten-question quizzes covering the text were administered to reinforce participant learning and team abilities. The instructor evaluated numerically how well they did as teams on each quiz as compared to individual results on the same questions before teamwork. Improvements from first to second quiz were noted and evaluated. Each team made suggestions on how to improve its performance in the remaining exercises.

The teams modeled the four chosen problems very well and, as a final exercise, found leverage points in each causal loop diagram for strategic planning and implementation. Evaluation criteria for final presentations were developed in plenary session. Using these criteria, the instructor graded the final presentations and presented the results on a transparency at the end of the training. Finally, the participants took a post-course test of knowledge acquired and evaluated the course. These evaluation results are available from SINAC.

In the opinion of this instructor, the course went well. The participants were excellent to work with, given their willingness to do the exercises, level of education, and overall level of institutional morale.

3. PRE AND POST COURSE LEVELS OF KNOWLEDGE AND ABILITIES

As required by contract, the instructor evaluated previous and acquired knowledge and abilities of participants (See Attachment I). Eighteen participants took the first test (one participant arrived shortly after the course had begun) and all nineteen took the post test. Each participant responded to questions about previous familiarity and training on definitions of the following four basic concepts (Table 1):

- strategic planning;
- environmental management system;
- organization culture;
- systemic thinking.

Table 1 - Previous familiarity and training of 18 participants about selected topics before the June 1998 course

	Yes	**No**	**No Answer**
About *strategic planning*:			
Participant familiar with term?			
	11	7	
Prior training on topic?			
	7	10	1
About *environmental management systems*:			
Participant familiar with term?			
	3	15	
Prior training on topic?			

		17	1
About *organizational culture*:			
Participant familiar with term?			
	6	12	
Prior training on topic?			
	2	16	
About *systemic thinking*:			
Participant familiar with term?		17	1
Prior training on topic?		17	1

If already familiar, each participant was asked to defined the same four terms at the beginning of the course. All were again asked to defined the four concepts after the training (Table 2).

Table 2 - Ability of participants to define selected terms before and after June 1998 course

	Before (22 June - 18 participants)	**After (26 June - 19 participants)**
Defined *strategic planning*?		
Correctly	5	11
Partially	4	6
Incorrectly	2	2
Omitted	7	
Defined *environmental management system*?		
Correctly		5
Partially	2	8
Incorrectly	1	5
Omitted	15	1
Defined *organizational culture*?		
Correctly	3	5
Partially	1	4
Incorrectly	2	9
Omitted	12	1
Defined *systemic thinking*?		
Correctly		12

Partially		5
Incorrectly		1
Omitted	18	1

All participants were also asked to list five practical applications of how strategic planning is important for the success of protected area systems (Table 3).

Table 3 - Ability of participants to cite practical examples of how strategic planning is important for the success of a protected area system

Number of Examples Correctly Cited	**Before (June 22 - 18 participants)**	**After (June 26 - 19 participants)**
None	6	2
One	3	4
Two	5	2
Three	3	2
Four	0	4
Five	1	5

Improvements in knowledge and abilities are generally observed to have occurred from June 22 to June 26.

Participants were evaluated by the instructor according to final project presentations on June 26 for their respective teams (Table 4).

Table 4 - Notas[1] para las presentaciones de los equipos de la capacitación de junio de 1998

E q u i p o

	Rojo	**Amarillo**	**Naranja**	**Lila**	(Peso)
Presentación	82 16.4	85 17	85 17	93 18.6	20%

Contenido (Abarca ampliamente el problema?)	92 36.8	97 38.8	88 35.2	95 38	40%
Aplicación correcta del método "pensamiento sistémico"?	94 37.6	96 38.4	89 35.6	96 38.4	40%
Nota Final:	90.8 = **91**	94.2 = **94**	87.8 = **88**	**95**	

[1]Excelente = 90-100, Bueno = 80-89, Regular = 70-79, Reprobado = 0-69

4. PARTICIPANT ROSTER AND INDIVIDUAL EVALUATIONS

The following 19 persons completed the course (Table 5). Each one's evaluation is included according to the grade received by the their respective teams as indicated in Table 4.

Table 5 - Persons completing the course and final evaluation grade according to team project presented.

Name	**Grade Received**
Jorge A. Bonilla	91
Adrián Arias	91
Eugenio Castro	91
Victor Vega	91
Luis Enrique Canales	91
Juan Diego Alforo Foloz	94
Gustavo Induni Alfaro	94
Carlos Zunigp Hernández	94
Eliecer Arce Eucuara	94

Gerardo Artavia Zamora	94
Freddy Salazar F.	88
Jose Badilla Orozco	88
Adolfo Sánchez Wong	88
Carlos Manuel Calvo Gutiérrez	88
Vilmar Villa lobos Villega	95
Randall Castro Salazar	95
Jairo Alonso Mora Carpio	95
Miguel Angel Rodríguez Ramírez	95
Yadira Mena Araya	95

5. CUESTIONÁRIO PARA CAPACITADORES/FACILITADORES

Nombre del capacitador/facilitador: James Jackson Griffith

Curso o evento impartido: Planificación Estratégica Para Áreas Silvestres Protegidas

Impartido en: Estación Experimental Horizontes, Guanacastes, Costa Rica

Procedentes de: Participants - SINAC/MINAE, Costa Rica. Instructor - Viçosa, MG, Brazil

Número de participantes: 19

Por favor responda a las siguientes preguntas:

1. **¿Cuáles fueron los objetivos principales a alcanzar durante este curso o evento? ¿Qué tipo de destrezas y habilidades procuró transferir a los participantes?**

The principal objective was to present within one week the relation between strategic planning of protected areas and the new concept of Environmental Management Systems (EMS), especially emphasizing systemic thinking and the influence of organizational culture on teamwork within and among groups. The special ability to be transferred was to learn how to model specific SINAC system-wide problems by using systemic thinking and working in teams.

2. Describa brevemente a las personas que Ud capacitó:

The 19 participants are technical members of SINAC/MINAE, the majority with university training. Most are from field offices and work directly with daily problems and supervision that affect the Costa Rican protected areas system. Two participants are directly responsible for system-wide strategic planning in San José.

3. ¿Considera que la capacitación impartida fue orientada al público correcto? ¿Por qué?

Yes. The participants represented the diverse geographical regions of Costa Rica's conservation system. They also represented several different categories of conservation units. Their supervisory responsibilities should permit them to solve problems that reflect and influence the entire protected area system.

4. ¿Cómo califica el grado de participación y recepción del grupo al que capacitó?

Muy participativo y receptivo

5. ¿Considera que el material utilizado fue aprovechado por los participantes? ¿Por qué?

Yes. The 65 page text was written especially for this course and contains new materials not found in other parks and reserves planning literature. Likewise, materials written about systemic thinking are rare in Spanish. The use of two quizzes during the week to evaluate teamwork learning and behavior motivated participants to read the material during their free time.

6. ¿Qué obstáculos encontró durante la capacitación?

The hot climate at the Horizontes Experimental Station adversely affects the learning environment.

7. ¿Cuál fue el mayor éxito y satisfacción de la capacitación?

In the instructor's opinion, the greatest success was each team's learning to model and suggest efficient solutions for specific SINAC system-wide problems using systemic thinking causal loops. This was evident in final project presentations. The greatest satisfaction was sharing the enthusiasm shown by participants for the collaborative teaching method and for completing assigned tasks in a spirit of good

teamwork. The instructor was ably assisted by the Costa Rican Coordinators, Gerardo Artavia Zamora and Yadira Mena Araya as well as by members of PROARCA/CAPAS (Jan Laarman, Teresa Robles, Alejandra Colom and Wendy Gonzáles) and Winrock International (Mary Mackey and Bonnie Wakeley).

8. ¿Tiene alguna sugerencia o comentario para capacitaciones futuras financiadas por PROARCA/CAPAS? ¿Cómo puede mejorarse la capacitación?

As a general technical reference and for possible future offerings of this specific course, the six-chapter text could be improved and published as an official PROARCA/CAPAS document.

ATTACHMENT I

PRE AND POST COURSE TESTS USED TO EVALUATE PARTICIPANT KNOWLEDGE

EVALUACIÓN DE CONOCIMIENTO PREVIO SOBRE LA PLANIFICACIÓN ESTRATÉGICA DE ÁREAS PROTEGIDAS
Programa PROARCA/CAPAS
Costa Rica, Junio de 1998

1. Sobre *planificación estratégica* (de modo general)**:**

¿Conoce Ud el término? Si No

Si ya conoce el término, defina con sus palabras lo que Ud cree ser la *planificación estratégica*:

_____

_____

_____

_____

En el pasado, ¿Ud ya participó en alguna capacitación sobre el asunto?

Si No

2. Sobre *Sistema de Gerenciamento Ambiental* (SGA):

¿Conoce Ud el término? Si No

Si ya conoce el término, defina con sus palabras lo que Ud cree ser un *Sistema de Gerenciamento Ambiental* (SGA):

_____

_____

_____

_____

_____

En el pasado, ¿Ud ya participó en alguna capacitación sobre el asunto?

Si No

3. Sobre *cultura organizacional*:

¿Conoce Ud el término? Si No

Si ya conoce el término, defina con sus palabras lo que Ud cree ser la *cultura organizacional*:

_____

_____

_____

_____

En el pasado, ¿Ud ya participó en alguna capacitación sobre el asunto?

Si No

4. Sobre el *pensamiento sistémico* (en organizaciones de aprendizaje)**:**

Conoce Ud el término? Si No

Si ya conoce el término, defina con sus palabras lo que Ud cree ser el *pensamiento sistémico*:

_____

_____

_____

_____

En el pasado, ¿Ud ya participó en alguna capacitación sobre el asunto?

Si No

5. Sobre la relación entre la *planificación estratégica* y s*istemas de áreas protegidas*:

Listar por lo menos cinco asuntos prácticos en los que la *planificación estratégica* es importante para el éxito del *sistema de áreas protegidas*:

a._____

b._____

c._____

d._____

e._____

EVALUACIÓN DE CONOCIMIENTO SOBRE LA PLANIFICACIÓN ESTRATÉGICA DE ÁREAS PROTEGIDAS

DESPUÉS DE LA CAPACITACIÓN DEL PROGRAMA PROARCA/CAPAS

Costa Rica, Junio de 1998

Capacitador: James Jackson Griffith

1. Defina *planificación estratégica* (de modo general):

_____

_____

_____

_____

_____

2. Defina *Sistema de Gerenciamento Ambiental (SGA)*:

_____

_____

_____

_____

_____

3. Defina *cultura organizacional*:

_____

_____

_____

_____

_____

4. Defina *pensamiento sistémico* (en organizaciones de aprendizaje):

_____

_____

_____

_____

_____

5. Listar por lo menos cinco asuntos prácticos en los que la *planificación estraégica* es importante para el exito del *sistema de áreas protegidas*:

a._____

b._____

c._____

d._____

e. _____